

STARTUP FOR Altigen (TAPIT)

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Follow the steps below to install and run TAPIT EX with Altigen system:

1. Install and set up TAPIT EX Multi-User – see instructions in the TAPIT EX manual or the Readme file.
2. If you are installing TAPIT CDR Loader for **multiple nodes** with SQL Server Database install and set up Remote Manager – refer to the Remote Manager manual on the CD.
3. Install CDR Loader from the TAPIT CDR LOADER folder on the TAPIT EX CD.
See TAPIT CDR Loader Readme file for instructions.
4. Setup CDR Loader - refer to the instructions below.

Setting up TAPIT CDR Loader for Altigen:

TAPIT Setup

Note: The Node data will be stored in the Main location database.

1. Open TAPIT application (Start/Programs/Tapit/Tapit).
Go to the System Maintenance/System Parameters/Communications screen.

System Parameters - Main

Communications | Call Costing | Activity | Trunks | Destination | Data

Phone Communications Settings

IMPORTANT: RESTART the SMDR Monitor if you made ANY CHANGES on this screen

Your Telephone Number: (973) 360-2300

Load Calls from Text File: C:\TAPITW32\DATA\MAIN\telmsg.dat

Process Text File Every: 300 seconds

Load Calls into Database Every: 15 minutes

Port: COM1

Speed: 9600

Parity: Even

Data Bits: 7 8

Stop Bits: 1 2

PBX Type: Altigen - AltWare 4.5 - CDR - NXP

eXtended Processing (not available for ALL PBX formats)

Use Computer or Telephone System Date?

Computer PBX

OK Password Cancel

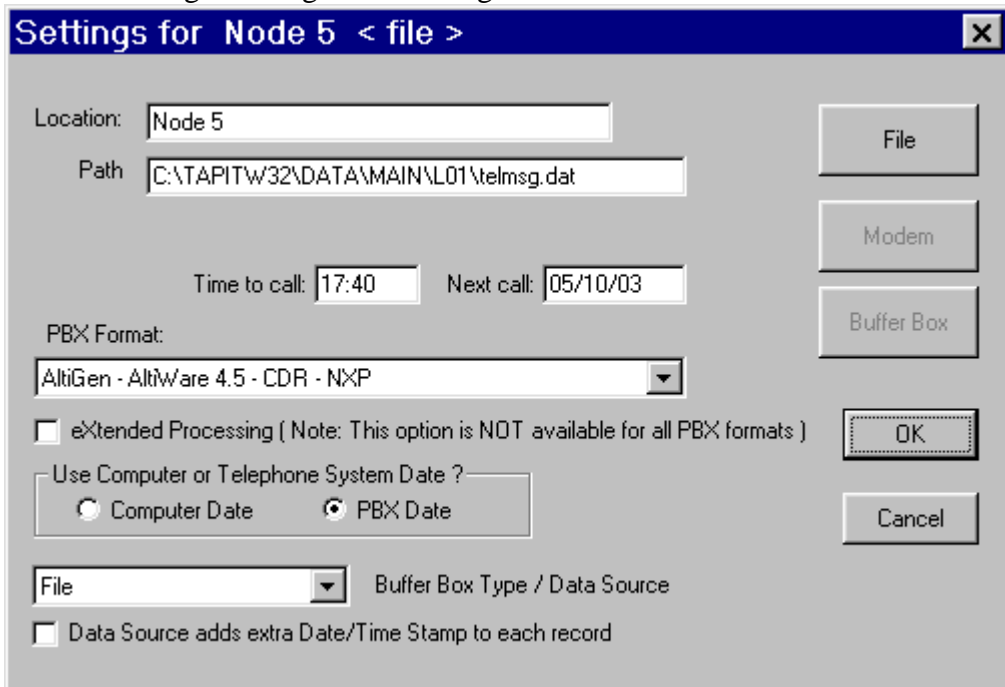
2. Check the Load Calls from Text File box. The default path field (i.e. *C:\TAPITW32\DATA\MAIN\telmsg.dat*) is activated. Accept the default.
3. Verify the Use Computer or Telephone System Date? option. It must be set to PBX.
4. Check eXtended Processing and make sure the correct PBX Type is selected.
5. Click on OK.
6. Close TAPIT.

Remote Manager Setup – ONLY for multiple nodes with SQL Server

Note: Each node requires one location (the Main location can be used too).
i.e. The example below is setup for 4 nodes:
data from first node (node 1) is collected in the Main location,
data from the remaining three nodes (nodes 3,5,8) is collected in corresponding
remote locations (Node 3, Node 5, Node 8 – we named our locations to reflect node
numbers for clarity of this example).

Note: By default one node is set as the Main location. All other nodes are set as remote
locations.

1. Open Remote Manager (Start/Tapit/Remote Manger).
2. If Remote Manager is opened for the first time, you need to create locations (see the Remote Manager manual for instructions) otherwise open each location to verify settings. Make sure the Remote Manager settings follow the guidelines below.



Each location should have the following options set:

- a) **Buffer Box Type** – select the **File** option. When this option is set to **File** the **Path** text box appears.
- b) **Path** – accept the default value.
- c) **Time to call:** and **Next call:** fields – these values pertain only to a buffer box. When the **CDR Loader** is used they are ignored.
- d) **PBX Format** - make sure the appropriate PBX format is selected.

e) Uncheck **Buffer Box** adds extra Date/Time stamp to each record.

TAPIT CDR Loader Setup

3. Open Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader).
The **CDR Loader** screen appears.
4. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
5. Click on **Wizard**. The Wizard will take you step by step through Tapit CDR Loader setup.
6. When the **Wizard** is finished your **TAPIT CDR Loader** screen will resemble the screens below.

Settings for Access database:

(For SQL Server settings refer to page 4)

Tapit CDR Loader 1.2.00 - Trisys, Inc.

Wizard Edit

To change settings click on the Stop Timer button.

You can change settings using Wizard or directly on the screen:
1. To change settings with Wizard click on the Wizard button and follow instructions.
2. To edit settings directly on the screen click on the Edit button and follow instructions from the Readme file

To test connection settings click on the Get Calls Now button

Telephone System
Altigen

Database Driver
{Microsoft Access driver (*.mdb)}

User Password

Data File Name
C:\AltIDb\Db\rtmCall.mdb Locate

Calls Table
rtmcall

Main Output File
C:\TAPITW32\DATA\MAIN\telmsg.dat Locate

Database Connection String
Driver={Microsoft Access driver (*.mdb)};DBQ=C:\AltIDb\Db\rtmCall.mdb;UID=;PWD=; Build Now

Process records every 5 minutes Multi Sites

New records found: 0
New records processed: 0
Last processing started:
Total records processed: 0
Session started: 15:08:21 Mon, 05/12/03

Stopped... Start Timer OK Shut Down

Get Calls Now Show Log File

Settings for SQL Server database:
(For Access database instructions refer to page 3)

Tapit CDR Loader 1.2.00 - Trisys, Inc.

Wizard Lock / Apply

Telephone System
Altigen

Database Driver
{SQL Server}

To change settings click on the Stop Timer button.
You can change settings using Wizard or directly on the screen:
1. To change settings with Wizard click on the Wizard button and follow instructions.
2. To edit settings directly on the screen click on the Edit button and follow instructions from the Readme file
To test connection settings click on the Get Calls Now button

Server Database Name User Password
myserver calldb sa 54321

Calls Table
rtmcall

Database Connection String: Build Now
Driver={SQL Server};Server=myserver;Database=calldb;UID=sa;PWD=54321;

Process records every 5 minutes Multi Sites

New records found: 0
New records processed: 0
Last processing started:
Total records processed: 0
Session started: 15:08:21 Mon, 05/12/03

Stopped... Start Timer OK Shut Down
Get Calls Now Show Log File

Note: If you need to adjust settings run the Wizard again or edit this screen manually – refer to Appendix A for instruction on manual editing.

APPENDIX A

Manual Editing – Setting Up CDR Loader for Single Node (Access and SQL Server Database)

If you need to adjust the TAPIT CDR Loader screen settings and the wizard outcome is not what you want, you can edit the settings manually.

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**.
The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Edit**. The name of this button changes to **Lock/Apply**.
4. **Access Database:**

If needed make the appropriate changes to the following fields:

Telephone System - select Altigen

Database Driver - must be "{Microsoft Access driver(*.mdb)}"

User – leave it blank

Password – leave it blank

Data File Name – enter the **default** value, *C:\AltiDb\Db\rtmCall.mdb* for the path to the data file.

Calls Table – the default value is *rtmcall*.

Main Output File - enter the **default** value, *C:\TAPITW32\DATA\MAIN\telmsg.dat*, for the path to the main output file in the TAPIT database folder.

NOTE: By default **User** and **Password** entries are empty.

NOTE: If Access MDB file is located on another machine the path to this file (**Data File Name** field) must be accessible from the TAPIT computer through a mapped drive or a network path with appropriate permissions. Typically the database file is located on the Altiserv machine and the local path to it is *C:\AltiDB\DB\rtmCall.mdb*.

SQL Database:

If needed make the appropriate changes to the following fields:

Telephone System - select Altigen

Database Driver - must be "{SQL Server}"

Server – SQL Server name

Database Name - the default value is *calldb*

User – SQL Server **User Name**

Password – SQL Server **User Password**

Calls Table – the default value is *rtmcall*

5. Click on the **Build Now** button to create the **Database Connection String** entry. This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the

entries above and click on **Build Now**.

Do not modify this field manually.

6. If required, enter new values in **Process record every**____minutes and **Main Output File** fields. It is recommended to accept defaults.
7. To save changes, click on the **Lock/Apply** button.
8. Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.

9. Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file. Copy the following settings into this file.

```
[Multi_S]
Max_S = 1
S_001=1,Main_99
;where S_xxx=Node_id,Loc_name
```

Save and close this file.

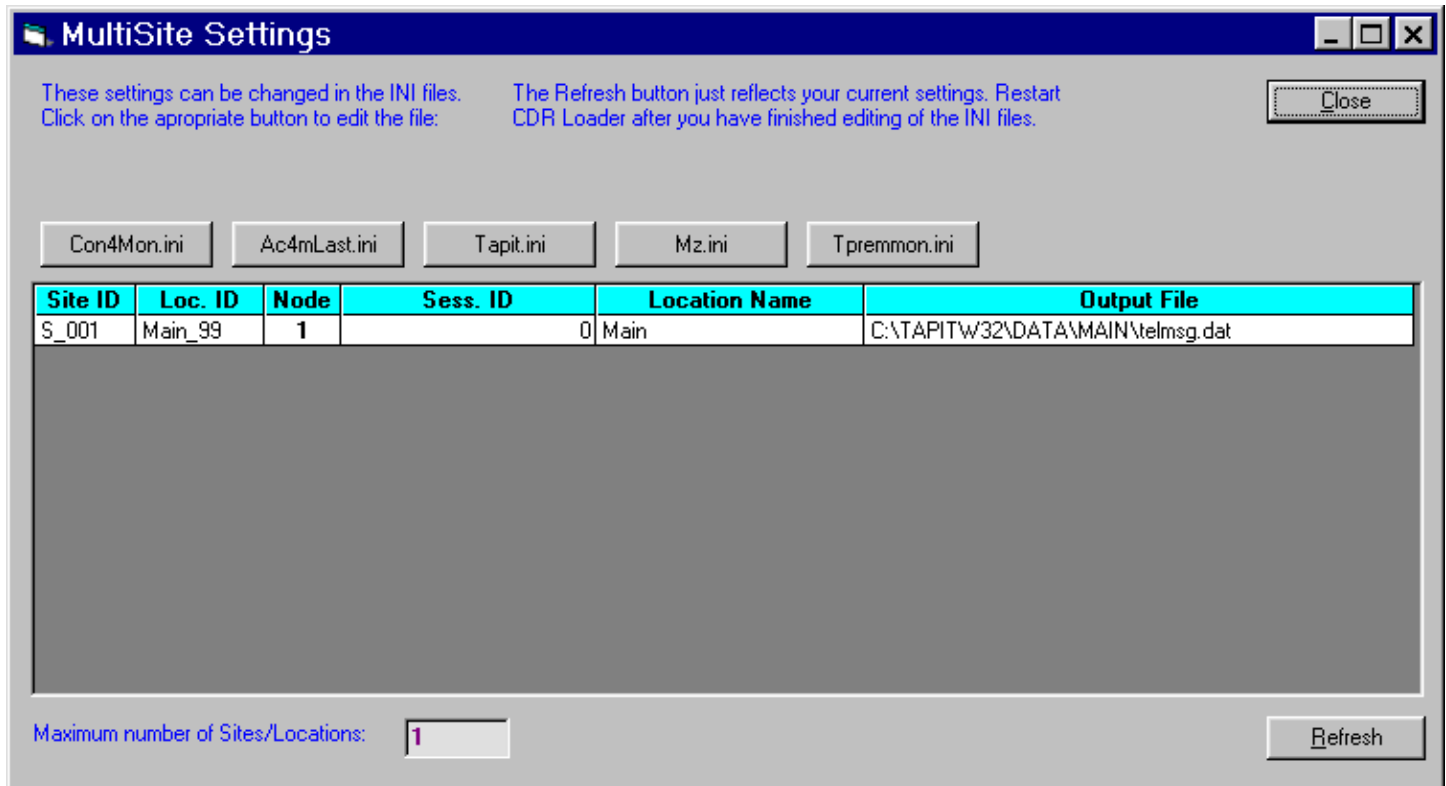
10. Click on the **Tpremmon.ini** button. Your default text editor opens the **Tpremmon.ini** file. Assuming the file is empty, copy the following settings into this file.

```
[Common]
TapitDir=C:\TAPITW32\DATA\MAIN
CurrLoc=0
RemTimer=0

[Main_99]
Location=Main
LocActive=1
LocDatPath=C:\TAPITW32\DATA\MAIN\telmsg.dat
```

11. Save the **Tpremmon.ini** file and close it.

12. Click on the **Refresh** button. Your **MultiSite Settings** screen should look like the screen below.



13. Click on the **Close** button.

14. Restart the **SMDR Monitor** application.

15. To test the connection, click on the **Get Calls Now** button. Keep in mind if the **CDR Loader** application is running for the first time it loads all (!) available call records.

16. Click on **Start Timer** to turn on the automatic mode.

17. Click on the **OK** button to minimize **CDR Loader**.

18. After **SMDR Monitor** loads call records, run reports to verify the program works fine.

Manual Editing – Setting Up CDR Loader for Multiple Nodes (SQL Server Database)

If you need to adjust the TAPIT CDR Loader screen settings and the wizard outcome is not what you want, you can edit the settings manually.

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**. The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Edit**. The name of this button changes to **Lock/Apply**

4. If needed make the appropriate changes to the following fields:
Telephone System - select Altigen
Database Driver - must be "{SQL Server}"
Server – SQL Server name
Database Name - the default value is **calldb**
User – SQL Server **User Name**
Password – SQL Server **User Password**
Calls Table – the default value is **rtmcall**
5. Click on the **Build Now** button to create the **Database Connection String** entry. This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the entries above and click on **Build Now**.
Do not modify this field manually.
6. If required, enter new values in **Process record every___minutes** and **Main Output File** fields. It is recommended to accept defaults.
7. To save changes, click on the **Lock/Apply** button.
8. Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.
9. Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file. Copy the following settings into this file. Edit site entries to reflect your node numbers.

Note: The Max_S entry reflects the number of your nodes. Each S_xxx entry must correspond to existing node and appropriate location code.

For example: We created location with a default name "New Location 02" and then renamed it to "Node 5". Remote Manager automatically assigned Comm_1 code to that location.

The "S_003=5,Comm_01" entry (in the example below) associates node 5 and location code Comm_01 with site S_003.

```

;Reference table to handle multiple nodes:
[Multi_S]
;must be = total/max number of locations used
;(if last S_xxx is S_004 then Max_S=4)
Max_S = 4
S_001=1,Main_99
S_002=3,Comm_00
S_003=5,Comm_01
S_004=8,Comm_02
;where S_xxx=Node_id,Loc_name
Save and close this file.

```

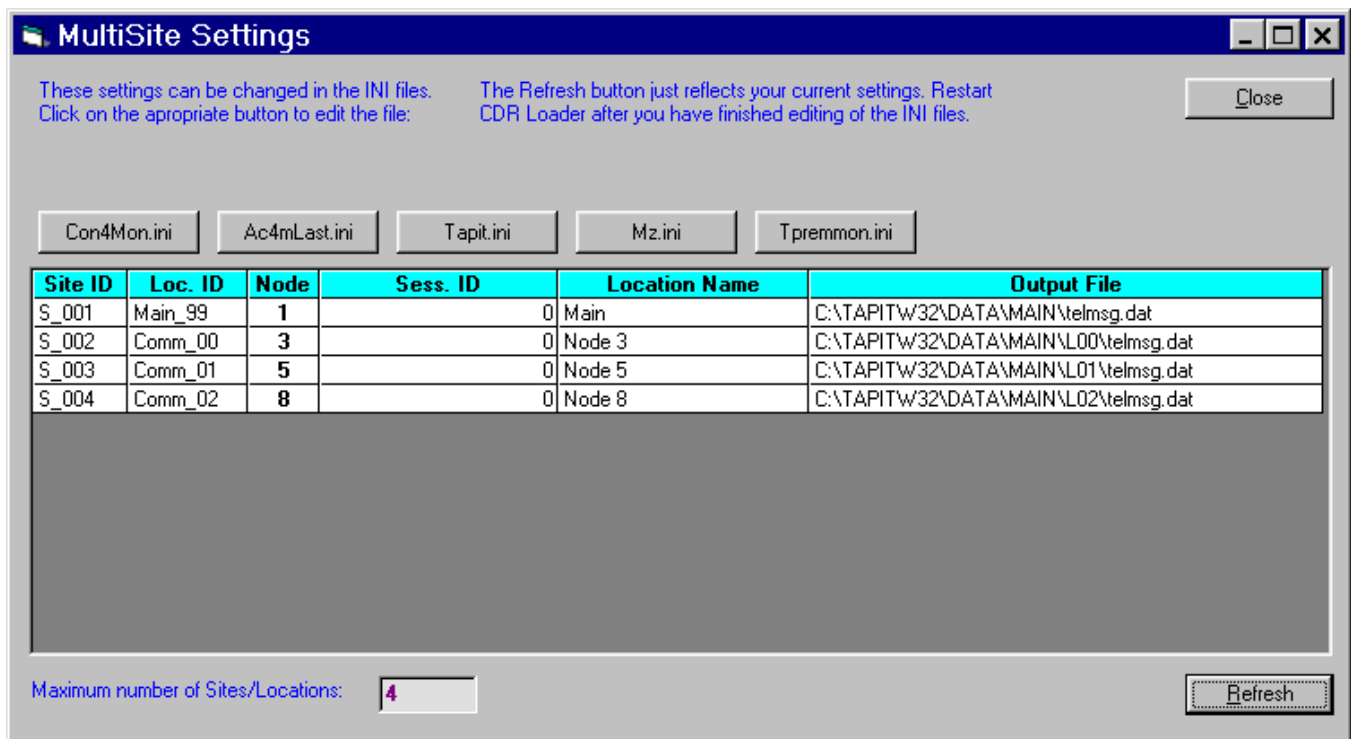
10. Click on the **Tpremmon.ini** button.

- Your default text editor opens the Tpremmon.ini file. Make sure this file contains the following settings.

```
[Common]
TapitDir=C:\TAPITW32\DATA\MAIN
CurrLoc=0
;RemTimer - timer setting required for multiple nodes/locations
;value is in seconds... minimum=300 sec.
RemTimer=300
```

```
[Main_99]
Location=Main
LocDir=C:\tapitw32\Data\Main\TAPITDB.MDB
LocActive=1
LocDatPath=C:\TAPITW32\DATA\MAIN\telmsg.dat
```

- Save the Tpremmon.ini file and close it. Click on the Refresh button. Your MultiSite Settings screen should look like the screen below.



- Click on the Close button.
- Restart Remote Manager.
- Restart the SMDR Monitor application.
- To test the connection, click on the Get Calls Now button. Keep in mind if the CDR Loader application is running for the first time it loads all (!) available call records for all nodes.

17. Click on **Start Timer** to turn on the automatic mode.
18. Click on the **OK** button to minimize **CDR Loader**.
19. After **SMDR Monitor** and **Remote Manager** load call records, run reports in TAPIT for each location to verify that everything works.

Note: Sample con4mon.ini file is located in the C:\CDR Loader\ini_files folder.

Note: CDR Loader will also create file ac4mlast.ini. This file always will be created automatically in the current Tapit Database folder. Do NOT delete this file.
